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THE EPISCOPAL DIOCESE OF NORTHERN CALIFORNIA

MANUAL AND GUIDE FOR ORDINATION

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INTRODUCTION

All Christians by virtue of their baptism are called to ministry. Some minister as lay persons and others as ordained. It is the responsibility of the Church to help its members discern to which of these ministries they are called.

While the call to ordained ministry is individual, ordination is performed in, by, and for the Church. Therefore, the Church is obligated to establish the integrity of that call, assure the suitability of the individual for the call, and determine that the ordination will help fulfill the needs of the Church for ministry.

This Manual outlines the processes toward the diaconate and the priesthood as stipulated by both diocesan and national canons. The various requirements should not be considered as hurdles to be overcome, but as a gradual process of discernment in which an individual and the Church discover the will of God for that individual. The local congregation, the Commission on Ministry, the Standing Committee, and the Bishop work together in the process of discernment.

All those considering a call to ordained ministry should carefully read the Ordination Rites in *The Book of Common Prayer* and the Title III Canons concerning ministry in *The Constitution and Canons of The Episcopal Church*.

The Bishop has identified several essential traits to look for and foster in those seeking ordination in the Episcopal Church. Those seeking ordination as a priest or deacon should:

- Have a thorough knowledge of and devotion to the Holy Scriptures and the Book of Common Prayer. Familiarity with other resources (i.e., other forms of worship authorized by General Convention, such as the Book of Occasional Services and Enriching Our Worship) is also encouraged.
- Have a lively faith, regular spiritual disciplines, and a desire for holiness in all aspects of life.
- Be healthy, emotionally resilient, and spiritually mature individuals who relate well with others and have demonstrated capacities for leadership.
- Have the ability to thrive within the professional and organizational structures of the Episcopal Church and to maintain collegial relationships with other clergy, staff, lay leaders and diocesan officials.

In addition, in the Episcopal Diocese of Northern California, it is expected that those seeking ordination as a deacon or as a priest will:

- Be able to articulate one's life story, including the dimensions of spiritual pilgrimage. The story should show growth and development, demonstrate intellectual competence and capacity for leadership, and reflect elements of personal devotion, as well as times of struggle.
- Be a confirmed adult communicant in good standing of a local congregation or member of a Community of Religious and involved in that congregation's or community's worship, education, witness, and ministry. This involvement should be at least two years in duration; the first as an active member of the parish/community, and the second engaged in discernment. This involvement should be of such a quality that the clergy and congregation are able to determine the applicant's sense of call and affirm readiness and suitability for entry into the process toward ordination. *Canon III.6.2 and Canon III.8.2*
- Be willing to take the initiative in completing applications for each step in the ordination process and provide all required certificates and reports.
- Be at a point in life where devoting at least four years from Postulancy to Ordination is realistic.
- Be prepared to complete a required course of study and formation approved by the Commission on Ministry and the Bishop.
- Be responsible for financial costs of ordination throughout the process.

Important timing issues that you need to know:

- You may be ordained a Priest no sooner than 6 months after ordination to the Diaconate, and only after at least 18 months have passed since the date of your written acceptance of your Vestry's or comparable body's nomination. *Canon III.8.7(a.1)*
- You may be ordained a Vocational Deacon only after at least 18 months have passed since the date of your written acceptance of your Vestry's or comparable body's nomination. *Canon III.6.6(a.1)*
- You must be at least 24 years of age at the time of ordination to the Diaconate. C*anon III.6.6(a.2) & Canon III.8.7(a.2)*
- It is the policy in the Episcopal Diocese of Northern California that the time between designation as a Candidate for Holy Orders and Ordination be a minimum of six months.
- All medical/psychological evaluations and background checks must be completed no more than 36 months before your ordination as a priest or

deacon. *Canon III.6.5(j) & Canon III.8.7(a.3)*. Because formation for ordained ministry often takes more than 36 months, you will likely need to have these evaluations and background checks updated to satisfy this requirement. *Please consult the Ordination Process Coordinator if you have been previously evaluated and need any updates to meet this requirement.*

Discernment of your call will be ongoing throughout the ordination process. This Manual provides a general description of the ordination process. Each individual's situation is different, so it is possible that you will be asked to do something that is not listed in this general description. It is important to understand that the Bishop has the right to remove you from the ordination process at any time if the Bishop no longer believes that you are called and/or suited to ordained ministry.

Inform yourself as to all of the steps of this process and the documentation required. The Ordination Process Coordinator is available to help you with questions about deadlines, forms and procedures. You should retain copies of all documents and information you send to the Office of the Bishop and Commission on Ministry.

Once you are made a Postulant, keep in regular contact with the Commission on Ministry liaison that has been assigned to you. You are responsible for updating the liaison on the progress of your formation. The liaison will report your progress periodically to the Commission on Ministry.

As part of its commitment to implementing Resolution 2015-D014 of the General Convention of the Episcopal Church (*Evaluate Individuals in the Ordination Process for Addiction Concerns*), the Episcopal Diocese of Northern California has created a policy on *Alcohol/Substance Dependency and Mental Health Issues for Individuals Seeking Ordained Ministry*. A copy of the policy can be found in Appendix A of this Manual.

A special note regarding reception of clergy from other churches: If you have been ordained in another Christian denomination and are interested in becoming an Episcopal deacon or priest, you must attend the Day of Discernment with your sponsoring clergyperson. Your ordination process will vary in some ways from that described in this Manual. The applicable canonical requirements can be found in *Canon III.10*, which you should review carefully. Contact the Ordination Process Coordinator for further guidance.

Steps To Postulancy

For Both The Diaconate And The Priesthood

Aspirant ➔ Nominee ➔Postulant

Both those called to the diaconate and those called to the priesthood initiate the process toward ordination by applying to be designated as a Postulant for Holy Orders. The procedure and requirements for Postulancy are the same for both orders. Once designated as a Postulant, the person then pursues the path toward the appropriate order.

1. The Aspirant's Interview with the Member of the Clergy
    a. The process toward ordination begins with thorough discussions between the Aspirant and the Member of the Clergy in Charge of the Aspirant's congregation (also known as the **sponsoring clergyperson**). In most circumstances, it is not appropriate to begin the nomination process when a congregation does not have a permanent Rector, Vicar, Priest-in-Charge, or regular supply priest in place.
    b. The sponsoring clergyperson should refer to the **Guide For Sponsoring Clergy*** to direct their early discernment work with those feeling a call to ordained ministry. A copy of this Guide can be found in Appendix B of this Manual. It is also available on the Diocesan web site. *(Hereafter, an asterisk in the text will indicate a form or document on the "Discerning a Call to Ministry" or "In the Ordination Process?" web pages in the Commission on Ministry section of the Diocesan web site.)*
    c. It is the sponsoring clergyperson's discretion either to affirm or decline that it is the appropriate time for the Aspirant to continue with the formal process of discernment for ordained ministry.
    d. Regarding Communities of Religious: In the case of a member of a Community of Religious seeking nomination for Postulancy, the role of a Member of the Clergy will be taken by the Superior of the Order, if they are an ordained priest and, if not, by the chaplain for the order. The role of the Vestry is taken by the Governing Council or Board of the Order. *Canon III.5.2(d)*
2. The Day of Discernment
    a. The Day of Discernment is intended to help all members of the Episcopal Church deepen their understanding of the work of the Holy Spirit and the many ways one can be called to serve in the Church. During the Day of Discernment, presentations on lay ministries, the priesthood, the diaconate, and religious orders active in our diocese will be provided. There will also be an overview of the ordination process (including handing out an application packet and a copy of **The Manual and Guide for Ordination***).

b. The Day of Discernment is offered twice yearly on a Saturday (once in the spring in the Sacramento area, and once in the fall at a location outside of the Sacramento area). Attendance is mandatory for both sponsoring clergy and those seeking ordination.

c. If the sponsoring clergyperson cannot attend the Day of Discernment with the Aspirant, the sponsoring clergyperson should notify the Bishop as soon as possible. With the Bishop's permission, the sponsoring clergyperson may then appoint another clergyperson from the sponsoring congregation (preferably, someone who already has a pastoral relationship with the Aspirant) to accompany the Aspirant to the Day of Discernment. If there is no other clergyperson from the sponsoring congregation available, a senior warden may be appointed.

d. No Aspirant is eligible to be invited to a Discernment Weekend by the Bishop until <u>after</u> that Aspirant has attended a Day of Discernment.

e. Spouses and family members are welcome to attend the Day of Discernment. Contact the Office of the Bishop to RSVP for the Day of Discernment.

3. Regional Discernment Group (RDG)

a. After attending the Day of Discernment, the sponsoring clergyperson will arrange for the Aspirant to meet with an RDG. An RDG takes the place of what used to be known as a PCOM (Parish Commission on Ministry) and was more recently known as a CCOM (Congregational Commission on Ministry).

b. An RDG consists of members (lay and ordained) with particular gifts for discernment. At least 1/3 of its members must be from congregations other than the Aspirant's sponsoring congregation.

c. A copy of the **Regional Discernment Guidelines*** can be found in Appendix C of this Manual. The guidelines are also available on the Diocesan website.

d. After a series of meetings with the Aspirant, the RDG prepares a report with a formal recommendation to the sponsoring clergyperson, the Vestry or comparable body, and the Bishop regarding the Aspirant's suitability for ordination.

e. Congregational support is still important for individuals seeking ordination. If the Aspirant's sponsoring congregation has a PCOM or CCOM, its role is to provide ongoing support <u>after</u> the Aspirant becomes a postulant, rather than to make a

formal recommendation about the Aspirant's suitability for ordination.

4. Review of RDG Report by Vestry or comparable body and Sponsoring Clergyperson
    a. The Sponsoring Clergyperson and Vestry or comparable body review the RDG report.
    b. If the Sponsoring Clergyperson and Vestry or comparable body decide to endorse the Aspirant for Postulancy, the following should be sent to the Office of the Bishop, with copies also sent to the Aspirant (who now becomes a Nominee):
        i. **Endorsement Of Application For Postulancy**,* which must be signed by the Member of the Clergy in Charge and at least two-thirds of the Vestry or comparable body. *Canon III.5.2(c), Canon III.6.2(a) and Canon III.8.2(a)*
        ii. **Report of RDG to Clergy and Vestry or Comparable Body** *Canon III.6.2(b.5) and Canon III.8.2(b.5)*
        iii. **Written Acceptance of Nomination for Postulancy**. This acceptance should be in the form of a letter from the Nominee to the Bishop, which states the Nominee's acceptance of their Vestry's or comparable body's Nomination for Postulancy. *Canon III.6.2(b) & Canon III.8.2(b)*
5. Formal Application and Supplemental Items that are typically required. *Please check with the Ordination Process Coordinator for a complete list of requirements, deadlines and current forms.*
    a. **Endorsement Of Application For Postulancy*** *Canon III.5.2(c), Canon III.6.2(a) & Canon III.8.2(a)*
    b. **Report of RDG to Clergy and Vestry or Comparable Body*** *Canon III.6.2(b.5) & Canon III.8.2(b.5)*
    c. **Written Acceptance of Nomination for Postulancy**. *Canon III.6.2(b) & Canon III.8.2(b)*
    d. **Authorization And Release Form*** for psychiatric and/or psychological assessment. *Canon III.6.5(j) & Canon III.8.5(k)*
    e. Current Oxford Document Management Company background check - *initiated by the Office of the Bishop*
    f. **Medical Exam Form*** *Canon III.6.5(j.2) & Canon III.8.5(k.2)*
    g. Psychological evaluation forms. These forms include: **Behavior Screening Questionnaire*** and **Life History Questionnaire.***

h. Paid invoice from your congregation for evaluation and background checks.

i. The **Application For Holy Orders ***

j. The **Personal Data Sheet***

k. Six letters of recommendation from a variety of sources. One of these must be from the Nominee's Rector or Clergy Person in Charge.

l. Current resume.

m. A wallet-size high-resolution photograph.

n. Evidence of Baptism and Confirmation. *Canon III.6.2(b.3) & Canon III.8.2(b.3)*

o. Transcripts of college work or equivalent. *Canon III.6.2(b.6) & Canon III.8.2(b.6)*

6. Sponsoring Clergyperson's Letter of Introduction to the Bishop

    a. The sponsoring clergyperson must send a written Letter of Introduction to the Bishop. Instructions for preparing this letter can be found in the **Guide For Sponsoring Clergy.***

    b. The Letter of Introduction must cover each of the areas listed in the **Guide for Sponsoring Clergy***.

7. Psychological Evaluation

    a. The Nominee is evaluated by and receives psychological testing using a designated diocesan instrument that meets canonical requirements. *Canon III.6.5(j.2) & Canon III.8.5(k.2)*

    b. The psychological evaluator sends a copy of this confidential report to the Bishop, who may review it with a psychological consultant. The psychological evaluation is kept in a confidential file in the Office of the Bishop. The Commission on Ministry and Standing Committee do not have access to this file.

8. Meeting with the Bishop

    a. The Bishop will review the Nominee's entire application and all associated paperwork, including reports from required medical/psychological examinations and background check **prior to** her first meeting with the Nominee.

    b. Once the Nominee has confirmed with the Ordination Process Coordinator that the Nominee's application file is complete, the Nominee schedules an appointment with the Bishop.

c. The Nominee may bring someone for pastoral support (such as the sponsoring clergyperson, spouse, or friend), but the meeting will be between the Nominee and the Bishop.

d. After the Bishop has met with the Nominee and reviewed the Nominee's file, the Bishop will decide whether or not to invite the Nominee to a Discernment Weekend with the Commission on Ministry and representatives from the Standing Committee.

e. The Bishop will notify the Nominee, the sponsoring clergyperson, and the Commission on Ministry of this decision.

9. The Discernment Weekend

    a. The Nominee is scheduled to attend a Diocesan Discernment Weekend. Typically one or two Discernment Weekends are scheduled each year.

    b. All documentation required in the application process above must be in the Office of the Bishop six weeks in advance of the Discernment Weekend.

    c. The Discernment Weekend is an intensive time of prayer and discernment, with-in-depth interviews conducted by members of the Commission on Ministry and the Standing Committee.

    d. The interviews may cover the following or similar topics: spiritual life and prayer, academic background and experience, sense of call to ministry, family life and self-care, leadership formation and ecclesiology.

    e. At the conclusion of the weekend, the Commission on Ministry and Standing Committee will determine whether or not to recommend the Nominee to the Bishop for admission to Postulancy.

    f. Nominees will be informed what the Commission on Ministry and Standing Committee will be recommending to the Bishop.

    g. Following the Discernment Weekend, a scheduled phone call will be set up for the Bishop to discuss the weekend with the Nominee, and at that time the Bishop will inform the Nominee of her decision concerning Postulancy.

10. If the Bishop decides to make the Nominee a Postulant, the Nominee will also receive a formal letter stating such from the Bishop.

11. Appointment of a Liaison. The Commission on Ministry will appoint one of its members to be a liaison between the Postulant and the Commission on Ministry.

The Path Toward Ordination As A Vocational Deacon

Postulant ➔ Candidate ➔ Ordinand ➔ Deacon

Steps To Candidacy

1. The Formation Committee of the Commission on Ministry will prepare an Individual Formation Plan to guide the Postulant's theological study and formation for diaconal ministry.
2. The Formation Committee may consult the Bishop, Archdeacons, and such other individuals as they deem necessary to prepare the Postulant's Individual Formation Plan.
3. The Individual Formation Plan will cover all canonically required training and is designed to provide a rigorous and thorough theological and pastoral education. It may involve a combination of online and in-person classes. The Postulant may need to travel and incur significant expenses to attend these classes.
4. The Individual Formation Plan will require significant time and effort on the part of the person following it.
    a. The plan will be overseen by a Mentoring Deacon.
    b. The plan will be set forth in a written document signed by the Bishop, Postulant, Mentoring Deacon, and the Chair of the Commission on Ministry.
    c. Progress under the plan will be evaluated at least annually by the Mentoring Deacon, and will be reported to the Commission on Ministry and the Bishop in writing.
5. Trainings in the following areas are required:
    a. Prevention of sexual misconduct against both children and adults. *Canon III.6.5(g.1)*
    b. Civil requirements for reporting and pastoral opportunities for responding to evidence of abuse. *Canon III.6.5(g.2)*
    c. The Constitution and Canons of the Episcopal Church, particularly Title IV thereof. *Canon III.6.5(g.3)*
    d. The Church's teaching on racism. *Canon III.6.5(g.4)*
    e. Community Organizing: Completion of an approved Community Organizing Training course such as Asset-Based Community Development (ABCD), or trainings offered by PICO or IAF (*Episcopal Diocese of Northern California Local Requirement*)

6. Commission on Ministry Liaison: The Postulant and their Commission on Ministry Liaison will maintain frequent (preferably monthly) contact. Postulants are particularly requested to communicate any change in their circumstances that may impact their process of education and formation.
7. Communication with the Bishop: The Postulant will communicate with the Bishop in person or by letter four times a year in the Ember Weeks. The purpose of these communications is to inform the Bishop of the Postulant's academic, diaconal, human, spiritual, and practical development. Copies of written communications may be sent to the Postulant's Commission on Ministry Liaison at the Postulant's discretion. *Canon III.6.3(e)*
8. Commission on Ministry: The Commission on Ministry will interview the Postulant as needed and make recommendations regarding the Postulant's preparation.
9. Candidacy Interview: Prior to the final year of the prescribed program for theological study, the Commission on Ministry will interview the Postulant to evaluate the Postulant's fitness for Candidacy. At that time, the Commission on Ministry will make a recommendation to the Bishop and Standing Committee regarding designation as a Candidate. This decision is based upon the Postulant's progress to date in completing the requirements of the Postulant's Individual Formation Plan. If the Commission on Ministry recommends the Postulant for candidacy, the Standing Committee will then interview the Postulant and make a recommendation to the Bishop. *Canon III.6.4(b)*
10. Candidacy Forms and Application: Before the Candidacy Interview with the Commission on Ministry and the Standing Committee, the Postulant must file a **Application For Admission To Candidacy - Postulant's Application*** form and obtain an **Endorsement Of Candidacy For Holy Orders*** form from the sponsoring clergyperson and the Vestry or comparable body of the sponsoring congregation and send it to the Bishop. *Canon III.6.4(a)*
11. The Bishop, upon the recommendation of the Commission on Ministry and Standing Committee, may then designate the Postulant as a Candidate for Holy Orders, and will notify the Candidate of this designation.
12. It is the policy in the Episcopal Diocese of Northern California that the time between designation as a Candidate for Holy Orders and Ordination be a minimum of six months, preferably longer.

Steps To Ordination As A Vocational Deacon

1. Completion of Education/Formation: The Candidate must successfully complete the program of theological study and diaconal formation prescribed in the Individual Formation Plan. Those overseeing the Individual Formation Plan should confirm the completion of required formation work.

The Candidate must request that final transcripts and proof of the awarding of the appropriate degree or certificate be sent to the Office of the Bishop. *Canon III.6.5(i)*

2. Communication with the Bishop: The Candidate will continue to communicate with the Bishop four times a year, in the Ember Weeks, reflecting on the Candidate's academic, diaconal, human, spiritual and practical development. *Canon III.6.5(h)*
3. Competency: Subject areas for study and demonstration of competence will include:
    a. Academic studies including: The Holy Scriptures, theology, and the tradition of the Church. *Canon III.6.5(f.1)*
    b. Diakonia and the diaconate. *Canon III.6.5(f.2)*
    c. Human awareness and understanding. *Canon III.6.5(f.3)*
    d. Spiritual development and discipline. *Canon III.6.5(f.4)*
    e. Practical training and experience. *Canon III.6.5(f.5)*
4. Assessment of Competency: The Candidate will be required to complete the Diaconal Synthesis Paper or an alternative form of assessment, as deemed appropriate by the Commission on Ministry's Academic Committee. The Diaconal Synthesis Paper or alternative form of assessment will be reviewed by the Academic Committee, which may require revisions and make further recommendations for the Candidate's formation.
5. Ordination Forms and Application: Before the Commission on Ministry and Standing Committee interview the Candidate for ordination, the following documents must have been received by the Office of the Bishop. *Please check with the Ordination Process Coordinator for a complete list of currently required forms and deadlines for submittal.*
    a. The **Application For Ordination To The Diaconate - Candidate's Application***. *Canon III.6.6(b.1)*
    b. An **Endorsement Of Ordination To the Diaconate*** from the sponsoring clergyperson and Vestry or comparable body of the sponsoring congregation recommending the Candidate for ordination. *Canon III.6.6(b.2)*
    c. Evidence from the Office of the Bishop of the dates of admission to Postulancy and Candidacy. *Canon III.6.6(b.3)*
6. Ordination Interview with the COM: The Commission on Ministry will interview the Candidate and make its recommendation for ordination to the Bishop and the Standing Committee. *Canon III.6.6(b.5)*
7. Ordination Interview with the Standing Committee: The Standing Committee will interview the Candidate and make its recommendation to the Bishop on the canonical form. *Canon III.6.6(c)*

8. Having all the required testimonies, approvals and recommendations in hand, the Bishop will set the time, date and place for the ordination and notify the Candidate, who is now designated an Ordinand.
9. No Candidate may be ordained a deacon until after at least 18 months from the date of their written acceptance of their Vestry's or comparable body's Nomination for Postulancy. *Canon III.6.6(a.1)*
10. Ordinands must be at least 24 years old at the time of their ordination. *Canon III.6.6(a.2)*
11. Ordination Service Planning: Consult the Ordination Process Coordinator for details about planning for this service.

The Path Toward Ordination To The Priesthood

Postulant ➔ Candidate ➔ Ordinand➔ Deacon ➔ Priest

Steps To Candidacy

1. The Formation Committee of the Commission on Ministry will prepare an Individual Formation Plan to guide the Postulant's theological study and formation for priestly ministry.
2. The Formation Committee may consult the Bishop and such other individuals as they deem necessary to prepare the Postulant's Individual Formation Plan.
3. The Individual Formation Plan will require significant time and effort on the part of the person following it.
    a. The plan will be overseen by a Mentoring Priest.
    b. The plan will be set forth in a written document signed by the Bishop, Postulant, Mentoring Priest, and the Chair of the Commission on Ministry.
    c. Progress under the plan will be evaluated at least annually by the Mentoring Priest, and will be reported to the Commission on Ministry and the Bishop in writing.
4. The normative avenue of study and formation will be completion of a Master of Divinity program at an approved Episcopal seminary or, if a Master of Divinity degree has been earned at a non-Episcopal seminary, the completion of a Certificate in Anglican Studies or its equivalent at an approved Episcopal seminary. A newly designated Postulant must consult with the Bishop regarding enrollment in a seminary approved by the Bishop.
5. The Individual Formation Plan is designed to provide as rigorous and thorough a theological and pastoral education as a traditional three-year residential Master of Divinity program. It may involve a combination of online and in-person classes. The Postulant may need to travel and incur significant expenses to attend these classes.
    a. If a traditional three-year residential Master of Divinity program at an approved Episcopal seminary is not possible, the first and best option to consider is a low-residency Master of Divinity program at an approved Episcopal seminary.
    b. For an individual who has already completed significant graduate work in the area of theological education, at its sole discretion the Commission on Ministry may create an alternative path that will round out the formation as necessary and appropriate. This path will normally include the completion of a Certificate of Anglican Studies or its equivalent at an approved Episcopal seminary.

6. Trainings in the following areas are required:
    a. Prevention of sexual misconduct against both children and adults. *Canon III.8.5(h.1)*
    b. Civil requirements for reporting and pastoral opportunities for responding to evidence of abuse. *Canon III.8.5(h.2)*
    c. The Constitution and Canons of the Episcopal Church, particularly Title IV thereof. *Canon III.8.5(h.3)*
    d. The Church's teaching on racism. *Canon III.8.5(h.4)*
7. Commission on Ministry Liaison: The Postulant and Commission on Ministry Liaison will maintain frequent (preferably monthly) contact. Postulants are particularly requested to communicate any change in their circumstances that may impact their process of education and formation.
8. Communication with the Bishop: The Postulant will communicate with the Bishop in person or by letter four times a year in the Ember Weeks. The purpose of these communications is to inform the Bishop of the Postulant's academic experience and personal and spiritual development. Copies of written communications may be sent to the Commission on Ministry Liaison at the Postulant's discretion. C*anon III.8.5(i)*
9. Commission on Ministry: The Commission on Ministry will interview the Postulant as needed and make recommendations regarding the Postulant's preparation.
10. Candidacy Interview: Candidacy Interview: Prior to the final year of the prescribed program for theological study, the Commission on Ministry will interview the Postulant to evaluate the Postulant's fitness for Candidacy. At that time, the Commission on Ministry will make a recommendation to the Bishop and Standing Committee regarding designation as a Candidate. This decision is based upon the Postulant's progress to date in completing the requirements of the Postulant's Individual Formation Plan. If the Commission on Ministry recommends the Postulant for Candidacy, the Standing Committee will then interview the Postulant and make a recommendation to the Bishop. *Canon III.8.4(b)*
11. Candidacy Forms and Application: Before the Candidacy Interview with the Commission on Ministry and the Standing Committee, the Postulant must file an **Application For Admission To Candidacy - Postulant's Application*** form and obtain an **Endorsement Of Candidacy For Holy Orders*** form from the sponsoring clergyperson and the Vestry or comparable body of the sponsoring congregation and send it to the Bishop. *Canon III.8.4(a).* The candidate should also request that the seminary send a "middler evaluation" (an evaluation done in the middle of the second year of a three-year residential seminary program) or its equivalent to the Office of the Bishop. *Canon III.8.5(j)*

12. The Bishop, upon the recommendation of the Commission on Ministry and Standing Committee, may then designate the Postulant as a Candidate for Holy Orders and will notify the Candidate of this designation.
13. It is the policy in the Episcopal Diocese of Northern California that the time between designation as a Candidate for Holy Orders and Ordination be a minimum of six months, preferably longer.

Steps To The Transitional Diaconate

1. Completion of Education/Formation: The Candidate must successfully complete the program of theological study and formation for the priesthood prescribed in the Individual Formation Plan. The Candidate must also request that final transcripts and proof of the awarding of the appropriate degree or certificate be sent to the Office of the Bishop. *Canon III.8.6(c.4)*
2. Communication with the Bishop: The Candidate will continue to communicate with the Bishop in person or by letter four times a year in the Ember Weeks. The purpose of these communications is to inform the Bishop of the Candidate's academic experience and personal and spiritual development. *Canon III.8.5(i)*
3. Competency: Subject areas for study and demonstration of competence will include:
    a. The Holy Scriptures. *Canon III.8.5(g.1)*
    b. History of the Christian Church. *Canon III.8.5(g.2)*
    c. Christian Theology. *Canon III.8.5(g.3)*
    d. Christian Ethics and Moral Theology. *Canon III.8.5(g.4)*
    e. Christian Worship according to the use of The Book of Common Prayer, the Hymnal, and authorized supplemental texts. *Canon III.8.5(g.5)*
    f. The Practice of Ministry in contemporary society, including leadership, evangelism, stewardship, ecumenism, interfaith relations, mission theology, and the historical and contemporary experience of racial and minority groups. *Canon III.8.5(g.6)*
    g. The development of pastoral skills through completion of an ACPE-accredited unit of Clinical Pastoral Education (CPE) or an equivalent experience approved by the Commission on Ministry and the Bishop.
    h. Competence in a second language sufficient to conduct a liturgy in that language so as to be easily understood by a native speaker. This requirement may be met by the completion of an intensive language school course, a college-level semester of study, or by demonstration to and certification by a person fluent in the second language.

4. Assessment: The Candidate will be required to take the General Ordination Examination (GOE), which is administered once a year in January. The Academic Committee of the Commission on Ministry will review the Candidate's GOE results. If the Candidate is deemed "not proficient" in any of the six canonical areas of study, the Academic Committee may recommend further work (including, but not limited to, re-writing any examination question deemed "not proficient") to demonstrate competency. Upon satisfactory completion of any further work required, the Academic Committee will inform the Commission on Ministry of the Candidate's readiness for ordination.

12. Ordination Forms and Application: Before the Commission on Ministry and the Standing Committee interview the Candidate for ordination, the following documents must have been received by the Office of the Bishop. *Please check with the Ordination Process Coordinator for a complete list of currently required forms and deadlines for submittal.*

    a. The **Application For Ordination To The Diaconate - Candidate's Application***. *Canon III.8.6(c.1)*

    b. Evidence of the dates of admission to Postulancy and Candidacy. *Canon III.8.6(c.3)*

    c. The form **Endorsement Of Ordination To the Diaconate*** from the sponsoring clergyperson and Vestry or comparable body of the sponsoring congregation recommending the Candidate for ordination. This must be signed by two-thirds of the Vestry or similar body. *Canon III.8.6(c.2)*

5. Ordination Interview with the Commission on Ministry: The Commission on Ministry will interview the Candidate and make its recommendation for ordination to the Bishop and the Standing Committee. *Canon III.8.6(c.5)*

6. Ordination Interview with the Standing Committee: The Standing Committee will interview the Candidate and make its recommendation to the Bishop on the canonical form. *Canon III.8.6(d)*

7. Having all the required testimonies, approvals and recommendations in hand, the Bishop will set the time, date and place for the ordination and notify the Candidate, who is now designated an Ordinand.

8. Ordinands must be at least 24 years old at the time of their ordination. *Canon III.8.7(a.2)*

9. Ordination Service Planning: Consult the Ordination Process Coordinator for details about planning for this service.

Steps To The Priesthood

1. A Candidate must first be ordained to the diaconate prior to being ordained to the priesthood and must serve as a deacon for a minimum of six months. *Canon III.8.7(a.1)*
2. A Transitional Deacon may be ordained a Priest after at least 18 months from the date of their written acceptance of their Vestry's or comparable body's Nomination for Postulancy. *Canon III.8.7(a.1)*
3. Priest-supervisor: The Bishop will assign the newly ordained transitional deacon to a priest-supervisor. For the duration of the transitional diaconate, the priest-supervisor oversees the deacon's spiritual, liturgical and professional development. A written recommendation from the supervisor to the Bishop is required at the conclusion of one year, or shorter period of time, if determined by the Bishop.
4. The Transitional Deacon Experience: All transitional deacons in the Episcopal Diocese of Northern California are required to participate in The Transitional Deacon Experience. This innovative program, coordinated by the Archdeacons of the diocese, introduces transitional deacons to the life and vocation of a deacon in the Episcopal Church through a combination of readings, discussions, and written reflections. The program is outlined in the document, **The Transitional Deacon Experience*.** A copy of this document can be found in Appendix D of this Manual.
5. Ordination to Priesthood Forms and Application: The Deacon will send an **Application For Ordination To The Priesthood*** to the Bishop. The sponsoring clergyperson and Vestry or comparable body of the sponsoring congregation (or, alternatively, of the congregation to which the Deacon is assigned) will certify approval for ordination to the priesthood, using the form **Endorsement Of Ordination To The Priesthood***, and signed by two-thirds of its members. *Canon III.8.7(b.1) & Canon III.8.7(b.2). Please check with the Ordination Process Coordinator for a complete list of currently required forms and deadlines for submittal.*
6. Ordination to Priesthood Interviews: The Commission on Ministry and the Standing Committee may interview the Deacon before making a recommendation to the Bishop using the form prescribed in the canons. C*anon III.8.7(b.5) and Canon III.8.7(c)*
7. When all requirements have been satisfactorily completed, the Bishop will arrange for ordination to the priesthood.
8. Ordination Service Planning: Consult the Ordination Process Coordinator for details about planning for this service.

If you have any questions about the ordination process or need further assistance, please contact the Ordination Process Coordinator (ordinations@norcalepiscopal.org).

Appendix A: Episcopal Diocese of Northern California Policy: Alcohol/Substance Dependency and Mental Health Issues for Individuals Seeking Ordained Ministry

Appendix B: Guide for Sponsoring Clergy

Appendix C: Episcopal Diocese of Northern California Regional Discernment Guidelines

Appendix D: The Transitional Deacon Experience

All references to Canons in this text are from:
Constitution and Canons together with The Rules of Order For the governance of the Protestant Episcopal Church in the United States of America, otherwise known as The Episcopal Church. Adopted and Revised in General Convention, 1789-2018, 2018 [PDF file]. Retrieved from https://extranet.generalconvention.org/staff/files/download/23914. *Errata Sheet* retrieved from https://extranet.generalconvention.org/staff/files/download/25429.

APPENDIX A:

The Episcopal Diocese of Northern California Policy:
Alcohol/Substance Dependency and Mental Health Issues
For Individuals Seeking Ordained Ministry

Episcopal Diocese of Northern California Policy:
Alcohol/Substance Dependency and Mental Health Issues
For Individuals Seeking Ordained Ministry

Policy

We are all broken people, striving, with God's grace, towards health and wellbeing in our lives. The problems of alcohol/substance dependency and mental illness are not viewed as character defects, but treatable medical issues. The Church supports the work of all individuals in seeking sobriety and wellbeing. The successful exercise of ministry, especially ordained ministry, requires that the individual be in a state of sobriety and good mental health. The following procedures address the minimum criteria for pursuing ordained ministry in this Diocese.

Diocesan Procedures

After receiving information concerning an applicant's prior or current treatment for alcohol or drug dependency or mental health wellbeing, the Bishop, at her or his discretion, shall advise the Chair of the Diocesan Commission on Ministry (DCoM) of these findings. This should be done prior to the Discernment Weekend so that these concerns can be addressed and explored at that time by the DCoM and the Standing Committee prior to a recommendation for Postulancy.

Should it be revealed that an individual in the ordination process has developed, or had a recurrence of an alcohol or substance abuse dependency problem while in formation, the individual's advancement to candidacy or ordination shall be placed on hold during a two-year, enforced sabbatical during which time the individual shall become involved in a recognized recovery program.

Should it be determined that an individual in the ordination process is experiencing mental health issues that affect their wellbeing, advancement toward ordination shall be placed on hold until it is deemed by a mental health professional that the individual may continue safely in the ordination process.

Alcohol/Drug Abuse & Dependence

Authority:

Resolution 2015-D014 — *Evaluate Individuals in the Ordination Process for Addiction Concerns*

- **Resolved***,* "That the sponsoring Clergy, Vestries, Commissions on Ministry, Standing Committees and Bishops interviewing and evaluating Nominees, Postulants and Candidates for Ordination explore directly issues regarding substance use in their lives and family systems; *and be it further,*
- **Resolved***, "*That Nominees, Postulants and Candidates who may have addiction issues be offered appropriate resources and referred to qualified mental health, healthcare and/or addiction professionals for further evaluation prior to proceeding in the ordination process."

Procedure:

1. An applicant that has experienced an addiction or dependency to alcohol, mind altering chemicals or drugs (to include illicit or prescription medications) which had created an abuse that affected their behavior, judgement and/or cognitive skills, shall have at least (2) years of continual sobriety prior to submitting an application to the ordination process. This time frame is indicative of an ongoing commitment to sobriety and successful recovery program that is recognized by health care professionals.

2. When an applicant with a prior history of alcohol or substance dependency (as noted on their application) has been approved to attend a discernment weekend, the Bishop may, at her/his discretion, inform the DCoM chair of the applicant's prior history of alcohol or substance dependency. The DCoM chair may, with the approval of the Bishop, inform other members of the DCoM. This will allow the DCoM chair to ensure that appropriate consideration of the applicant's history is possible during the weekend, while maintaining as much personal privacy for the applicant as possible.

3. In the case of an applicant with a prior alcohol or substance dependency history that meets the requirements in Section 1 and who is moved forward into Postulancy, that individual shall be involved in a continuing recovery program (such as the 12 Steps of Alcoholics Anonymous or Narcotics Anonymous) and be able to provide proof of participation throughout the ordination process. Other recognized treatment options agreed upon by the Bishop may also be utilized.

- Proof of participation can be obtained from a Sponsor, Mentor, Spiritual Director, DCoM Liaison or professional treatment facility.

4. Should it be revealed that a person in the ordination process has developed or had a recurrence of an alcohol or substance abuse dependency problem while in formation; advancement in the ordination process shall be placed on hold until the individual has completed 2 years of enforced sabbatical and continual sobriety recovery. Upon completion of the enforced sabbatical, the individual shall be evaluated by a treatment professional to ensure the individual is involved in successful ongoing recovery, is working a recognized recovery program and is able to continue the journey toward ordination. A report shall be forwarded to the Bishop by the DCoM Chair.

- During the enforced sabbatical period, the individual in the ordination process shall be supported through the Diocese, their Mentor, Spiritual Director and DCoM Liaison.
- If approved by the Bishop, academic formation can continue during the enforced sabbatical period.

Mental Health Wellbeing

1. When an applicant with a prior history of mental health treatment (as noted on their application) has been approved to attend a discernment weekend, the Bishop may, at her/his discretion, inform the DCoM chair of the applicant's prior history of mental health treatment. The DCoM chair may, with the approval of the Bishop, inform other members of the DCoM. This will allow the DCoM chair to ensure that appropriate consideration of the applicant's history is possible during the weekend, while maintaining as much personal privacy for the applicant as possible.

2. If, at the Bishop's discretion, the Bishop feels the individual's DCoM liaison should know of the individual's mental health history for informed monitoring during the ordination process, the DCoM liaison can be so informed.

3. If a DCoM member receives information from those associated with the individual in the ordination process, that a condition or behavior has surfaced that they believe may cause concern or affect the individual's ability to function in the ordination process, the DCoM Chair shall be so advised and a report forwarded to the Bishop by the Chair.

- If the individual's ordination process is placed on hold, it should be determined by a mental health professional approved by the Episcopal Diocese of Northern California when the individual may safely continue in the ordination process.

APPENDIX B
GUIDE FOR SPONSORING CLERGY

Guide for Sponsoring Clergy (Last Updated 01-17-20)

References. Title III (Ministry) of the Canons of the Episcopal Church establishes the ecclesiastical requirements for ordination to the diaconate or the priesthood. Each diocese implements the requirements of the canons in ways appropriate to its ministry context. In the Diocese of Northern California, our local implementation of the canonical requirements is reflected in *The Manual and Guide for Ordination* and associated materials.

Background. In the Episcopal Church, clergy and members of a congregation or faith community discern together in order to nominate individuals to the Bishop for possible ordination to the diaconate or the priesthood. By nominating a person for ordination, a congregation formally commits itself to contribute financial, spiritual, and practical support during the period of time in which that individual is preparing for ordination. The canons require that the clergyperson in charge of the individual's congregation ("sponsoring clergy") must approve and support the nomination in order for the process to move forward. (NOTE: In most circumstances, it is not appropriate to begin the nomination process when a congregation does not have a permanent Rector, Vicar, Priest-in-Charge, or regular supply priest in place.)

The Bishop's Expectations of Those Seeking Ordination. Our Bishop has identified several essential traits to look for and foster in those seeking ordination in the Episcopal Church. First, those seeking ordination should have a thorough knowledge of and devotion to the Holy Scriptures and the Book of Common Prayer. Familiarity with other resources (i.e., other forms of worship authorized by General Convention, such as the *Book of Occasional Services* and *Enriching Our Worship*) is also encouraged. Second, those seeking ordination should have a lively faith, regular spiritual disciplines, and a desire for holiness in all aspects of life. Third, those seeking ordination should be healthy, emotionally resilient, and spiritually mature individuals who relate well with others and have demonstrated capacities for leadership. Fourth, those seeking ordination should have the ability to thrive within the professional and organizational structures of the Episcopal Church and to maintain collegial relationships with other clergy, staff, lay leaders and diocesan officials.

Sponsoring Clergy Roles. The task of sponsoring clergy is not only to render a judgment about an individual's qualifications and readiness for seeking ordination as a deacon or priest, but also to facilitate the congregational discernment process. It is the obligation of sponsoring clergy **not to recommend** individuals who are not well-suited to ordained ministry in the Episcopal Church. Giving such an individual the "benefit of the doubt" is inappropriate and potentially harmful. It often leads to painful experiences further in the ordination process, after an individual has invested considerable time, money, and emotional energy in pursuing ordination. If a sponsoring clergyperson discerns an individual should not continue in the process, the individual should be assured of the Spirit's movement in his or her life and redirected towards lay ministries and other forms of community involvement better suited to his or her particular gifts and skills. These exploratory discussions should not be allowed to end on a negative note, leaving the individual with an incorrect impression that non-ordained service is not as vital, fulfilling, or important as ordained service.

Pastoral Responsibilities. Sponsoring clergy should care for individuals seeking ordination, as well as spouses and other family members, during the exciting, challenging, and sometimes stressful period of discernment that precedes further formation. This may be done by appointing a "shepherd" or other pastoral support team. This is a time in which it can be helpful for the individual to explore new areas of ministry as part of his or her discernment. These ministries may be at the congregational and/or diocesan level. For example, if an individual has not yet served as a licensed lay minister (Catechist, Eucharistic Minister, Eucharistic Visitor, Evangelism Facilitator, Healing Minister, Preacher, or Worship Leader) discernment is an appropriate time to explore one of these ministries further. Individuals may also consider

teaching an adult education class, working with children's and youth ministry, participating in ministries of justice and mercy, or learning about church governance by attending Vestry/Mission Committee meetings.

Requirements for Sponsoring Clergy. The clergyperson tasked with leadership of a congregation usually is the first person contacted by an individual considering a call to ordained ministry. Once the individual initiates contact by declaring a desire to pursue ordination, a sponsoring clergyperson must initiate the following steps:

1. **Hold a series of formal meetings with the individual to begin a process of serious discussion and exploration of the perceived call to ordained ministry.** Depending on the clergyperson's knowledge of the individual and the ability of the individual to articulate a sense of call, these meetings may last anywhere from several months to a year. The purpose of these discussions is to give the clergyperson the opportunity to assess the intellectual, moral, emotional, and spiritual capacities of the individual before moving forward in the ordination process. Specific topics that should be addressed in these meetings are:

A. The individual's familiarity with the Episcopal Church's canons regarding ordination (found in Title III) and with *The Manual and Guide for Ordination* and associated materials.

B. The baptismal vows undertaken by every Christian person, as well as the ordination vows for the Diaconate and the Priesthood. Individuals should be encouraged to spend time in prayer with the Baptismal Covenant and with the ordination vows for each order, paying specific attention to the aspects of the vows that seem most fitted to his or her sense of call.

C. The individual's familiarity with the Bible and the Book of Common Prayer. If the individual does not already have a strong grounding in these areas, the clergyperson should provide reading and self-study recommendations, as well as referrals to educational resources as EFM (Education for Ministry; in-person and online options available) and the online continuing education courses offered through CDSP's CALL program.

D. The individual's history with the Episcopal Church. If the individual is relatively new to the Episcopal Church and needs further grounding in the Anglican tradition, the clergyperson is encouraged to introduce him or her to *The New Church's Teaching Series* and/or the videos available through ChurchNext (www.churchnext.tv/library). If the individual has not been confirmed or received in the Episcopal Church, the sponsoring clergyperson must inform him or her that the discernment process cannot move forward until the individual has been confirmed or received.

E. The individual's personal experience of the Episcopal Church. Clergy should inquire as to the breadth of worship experience and ensure individuals understand that ordination is undertaken not for a specific congregation, but for the Episcopal Church as a whole. Deacons and priests must be able to function in a range of congregations, some of which may be very different from the individual's home congregation. During discernment, individuals should be encouraged to explore other Episcopal churches and learn about different modes and styles of worship.

F. The individual's understanding of the demands of the ordination process and the stresses it will place on work and family life. Those seeking ordination should be aware that in almost all cases, additional education and training will be required. This will likely involve financial costs, as well as travel and work away from family. There are also other costs associated with applying for Holy Orders (e.g., the background check, physical examination, and psychological examination).

2. **Accompany the individual to the Day of Discernment.** The Day of Discernment is offered twice yearly on a Saturday (once in the spring at the Office of the Bishop in Sacramento, and once in the fall at a location outside of the metropolitan Sacramento area). **Attendance at the Day of Discernment is mandatory for both sponsoring clergy and those seeking ordination.** If the sponsoring clergyperson

cannot attend the Day of Discernment with the individual, the sponsoring clergyperson should notify the Bishop as soon as possible. With the Bishop's permission, the sponsoring clergyperson may then appoint another clergyperson from the sponsoring congregation (preferably, someone who already has a pastoral relationship with the individual) to accompany that individual to the Day of Discernment. If there is no other clergyperson from the sponsoring congregation available, a senior warden may be appointed. No individual is eligible to be invited to a Discernment Weekend by the Bishop until after that individual has attended a Day of Discernment. The Day of Discernment is intended to help all members of the Episcopal Church deepen their understanding of the work of the Holy Spirit and the many ways one can be called to serve in the Church. During the Day of Discernment, presentations on lay ministries, the priesthood, the diaconate, and religious orders active in our diocese will be provided. There will also be an overview of the ordination process (including handing out an application packet and a copy of *The Manual and Guide for Ordination*). Spouses and family members are welcome to attend the Day of Discernment. Contact the Office of the Bishop to RSVP for the Day of Discernment.

3. **After attending the Day of Discernment, arrange for the individual to participate in a Regional Discernment Group.** The Diocese of Northern California is moving from a system of congregationally based discernment (formerly known as Parish Commissions on Ministry or PCOMs and more recently known as Congregational Commissions on Ministry or CCOMs) to a regional discernment model. Now, instead of convening a PCOM or CCOM for an individual, the sponsoring clergyperson arranges for the individual to participate in a Regional Discernment Group (RDG). **It is the RDG, rather than the PCOM or CCOM, that prepares a report with a formal recommendation to the sponsoring clergy, the congregation's Vestry/Mission Committee, and the Bishop about the individual's suitability for ordination**. An RDG consists of members (lay and ordained) with particular gifts for discernment. At least 1/3 of its members must be from congregations other than the individual's sponsoring congregation. Sponsoring clergy should contact their regional deans for information about RDGs in their deaneries. (NOTE: Congregational support is still important for individuals seeking Holy Orders. If a congregation has a PCOM or CCOM, its role is to provide ongoing support to individuals after they become postulants, rather than to make formal recommendations to the Vestry/Mission Committee about their suitability for ordination.)

4. **Send a written letter of recommendation to the Bishop concerning the individual's readiness to enter the ordination process**. In this letter, the clergyperson must do ALL of the following:

A. Describe his or her pastoral knowledge of the individual and the individual's family situation, and his or her understanding of the individual's perceived call to ordained ministry.

B. Assess the individual’s ability to make an honest self-examination and to receive feedback from others while discerning a call to ordained ministry.

C. Describe the individual’s spirituality, faithfulness in worship, reception of the sacraments, knowledge of the Scriptures, prayer life, understanding of the Church's faith, qualities and experience as a leader, loving interaction with others, and sense of social responsibility.

D. Describe the individual’s character, ministerial aptitudes, and specific gifts and talents that would contribute to the individual’s ministry and to the Church as a whole.

E. Identify potential areas and/or needs for further growth and development if the individual is made a postulant.

F. Specify the individual’s involvement in the life of the sponsoring congregation, including length of time known, length of congregational membership, and activities within the congregation.

G. Include reports from others whose resources may have been used in your initial evaluation.

5. **Ensure the formal (written) report from the Regional Discernment Group is completed and presented to the Vestry/Mission Committee** in support of the individual's nomination. Use the specific form ("Endorsement of Application for Admission to Postulancy") to communicate the congregation's official support of the Bishop making the individual a Postulant.

6. **Contact the Office of the Bishop** to schedule an initial meeting between the Bishop and the individual. **This meeting may not be scheduled until the individual's file is complete.** "Complete" means that all application materials (including recommendations, the Sponsoring Clergy's Letter of Introduction to the Bishop, the Regional Discernment Group's report, the Vestry/Mission Committee's Endorsement of Application for Admission to Postulancy, the background check, and the medical and psychological examination reports) have been received by the Office of the Bishop.

7. **The Bishop meets with the individual.** The individual may bring someone for pastoral support (e.g., sponsoring clergy, spouse, or friend), but the meeting will be between the Bishop and the individual. Provide spiritual support to the individual before and after the meeting. After the Bishop has met with the individual and reviewed his or her file, the Bishop will decide whether or not to invite the individual to a Discernment Weekend with the Commission on Ministry and Standing Committee to further explore a call to ordained ministry.

8. **If the Bishop invites the individual to a Discernment Weekend,** provide spiritual support to that individual both before and after the weekend. (NOTE: In order to avoid the appearance of a conflict of interest, sponsoring clergy who serve on either the Commission on Ministry or the Standing Committee should not participate in the individual's Discernment Weekend.)

9. **If the Bishop Does Not Invite the Individual to a Discernment Weekend,** provide spiritual support to the individual with particular attention to affirming his or her ministry gifts and redirecting him or her to the lay ministries (whether at church or in the world) for which the individual is best suited.

10. **If after the Discernment Weekend, the Bishop makes the individual a Postulant,** stay in touch with the individual during his or her time of formation for ordained ministry.

11. **Guide the Vestry/Mission Committee in correctly completing the Endorsement of Application for Admission to Candidacy form** at the appropriate time (generally, once the individual has been given a date for a candidacy interview with the Commission on Ministry and Standing Committee). Arrange for the form to be sent to the Office of the Bishop (attention: Ordination Process Coordinator).

12. **Guide the Vestry/Mission Committee in correctly completing the Endorsement of Application for Ordination to the Diaconate form** at the appropriate time (generally, once the individual has been given a date for an ordination interview with the Commission on Ministry and Standing Committee). Arrange for the form to be sent to the Office of the Bishop (attention: Ordination Process Coordinator).

13. (For Priesthood Only) **Guide the Vestry/Mission Committee in correctly completing the Endorsement of Application for Ordination to the Priesthood form** at the appropriate time (generally, once the transitional deacon has been given a date for an ordination interview with the Commission on Ministry and Standing Committee). Arrange for the form to be sent to the Office of the Bishop (attention: Ordination Process Coordinator).

Appendix A -- The Ordination Process (Up to Admission to Postulancy)

Individual's Personal Discernment

(The individual experiences a personal sense of call to ordained ministry and/or other people encourage the individual to consider pursuing ordained ministry.)

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Individual's Meetings with Sponsoring Clergy

(Sponsoring clergy meets with the individual to explore and assess the individual's sense of call. It is expected that these meetings will take place over a period no shorter than several months.)

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Individual's Attendance at a Diocesan Day of Discernment

(At the Day of Discernment, the individual will receive an application packet and a copy of *The Manual and Guide for Ordination*. After attending a Day of Discernment, the individual should begin completing the Application for Holy Orders and all associated paperwork. This can be done at the same time as the next step begins.)

↓

Individual's Work with a Regional Discernment Group

(Sponsoring clergy contact their Regional Dean to arrange for the individual to participate in a Regional Discernment Group, at least 1/3 of whose members are not from the individual's congregation. The Regional Discernment Group's written report goes to the individual, the individual's sponsoring clergy, the individual's Vestry/Mission Committee, and the Bishop.)

↓

Vestry and Sponsoring Clergy Nominate Individual for Postulancy

(The individual's Vestry/Mission Committee completes the Endorsement of Application for Admission to Postulancy form. In addition to signing the Endorsement, the sponsoring clergy writes a Letter of Recommendation to the Bishop.)

↓

Individual Meets with Bishop

(The Bishop will review the entire application and all associated paperwork, including reports from required medical/psychological examinations and background check **prior to** her first meeting with the individual and sponsoring clergy. After that meeting, the Bishop will decide whether to invite the individual to a diocesan Discernment Weekend.)

↓

Attendance at a Diocesan Discernment Weekend

(Commission on Ministry and Standing Committee meet with the individual to explore his or her call to ordained ministry, and make a recommendation to the Bishop regarding postulancy.)

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Bishop's Decision Regarding Admission to Postulancy

(The Bishop notifies the individual, sponsoring clergy, Commission on Ministry and Standing Committee of her decision regarding admission to postulancy.)

APPENDIX C:
REGIONAL DISCERNMENT GUIDELINES

THE EPISCOPAL DIOCESE OF NORTHERN CALIFORNIA REGIONAL DISCERNMENT GUIDELINES

In gratitude we would like to acknowledge and thank the Episcopal Diocese of El Camino Real, the Wingfield Deanery, The Reverend Canon Cookie Clark and The Reverend Susan Reeve for their contribution of time and wisdom in creating the foundation of these guidelines.

March 1, 2020

DIOCESE OF NORTHERN CALIFORNIA RDG INFORMATION AND TRAINING MANUAL

MAKE UP AND ROLE OF AN RDG TEAM----------PAGE 3

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The Make-Up and Function of a Regional Discernment Group Team

- An RDG (Regional Discernment Group Team) consists of four to six people, lay and ordained from various congregations in a deanery.

- The teams will be selected from a pool of approximately ten people who have been identified by the deans working with the rector/vicar/priest-in-charge in the churches in each deanery and trained by a Commission of Ministry authorized trainer(s). Once a team is selected at least 1/3 of its members must be from congregations other than the discerner's sponsoring congregation.

- It would be preferable to have as many churches within each deanery represented as possible to avoid bias for the discerner. There should be no more than 2 people from any one congregation on an RDG Team at any given time whenever possible.

- The time commitment for an RDG team is usually 8 to 10 meetings over a four to six-month period.

- The first meeting is devoted to information distribution, training and organization. After the first meeting, the dates, time and location of the remaining meetings are determined by the team and the discerner. The time commitment involves six to eight meetings with the discerner, the initial training and organization meeting, several team evaluation discussions before or after a meeting with the discerner, a meeting to assemble and prepare the final report, and finally, a meeting with the discerner to review the final report and discuss the RDG's recommendations.

- The final report remains confidential and should be distributed only to the discerner and the rector/vicar/priest-in-charge of the sponsoring congregation. The rector/vicar/priest-in-charge must exercise discretion in sharing it with their vestry and submit the final report to the Office of the Bishop.

The Suggested RDG Meeting Schedule

Session Topic:	**Participants:**
a. Initial Organization and Training Review	Dean/RDG Team
b. Introduction and Spiritual Journey	RDG Team/Discerner
c. Spiritual Life and Prayer	RDG Team/Discerner
d. Their Call to Ministry	RDG Team/Discerner
e. Family Life and Self Care	RDG Team/Discerner
f. Leadership and Ecclesiology	RDG Team/Discerner
g. Academic and Intellectual Life	RDG Team/Discerner
h. Preliminary Drafting of RDG Team Report	RDG Team
i. Review of the Final Report	RDG Team/R/V/P-I-C/Discerner

A detailed outline of the suggested Meeting Agenda will be presented in a later section.

WHAT IS DISCERNMENT

"In classical spirituality, discernment means identifying what spirit is at work in a situation: the Spirit of God or some other spirit."

(Suzanne G. Farnham, Joseph P. Gill, R. Taylor McLean, and Susan M. Ward, Listening Hearts: Discerning Call in Community, rev. ed. (Harrisburg, PA: Morehouse Publishing, 2002), p. 23).

What does discernment involve? A dictionary would tell you that "to discern" means "to recognize" or "perceive." What is done in an RDG Team is to attempt to discern - to recognize or perceive - the will of God for the Church and for the discerner. Attempting to discern the will of God is risky and bold - just as saying the Lord's Prayer is "bold." Therefore, discernment is, and should be, an exercise in prayer, careful listening or attentiveness, and patience. In discernment we are listening and waiting to gain clarity about the nature of a particular person's calling from God.

- Discernment is more than just a skill. Discernment is a gift from God before it is anything else. Yet there are clearly skills you can put to use when using your gift, and you can become better at it through training and experience.

- Discernment is more than just a process. Even for the most "material" or "nitty-gritty" matters, there is a Spirit at work nudging us, leading us, and even pulling us. Then again, even for the most "spiritual" matters, there are disciplines, methods, processes, means, and tools, which the Spirit can work through to help us discern rightly. Discernment isn't usually a sudden zap from beyond, but something which emerges from hard work and close attention.

Recommended reading:

Listening Hearts: Discerning Call in Community
(Suzanne G. Farnham, Joseph P. Gill, R. Taylor McLean, and Susan M. Ward, rev. ed. (Harrisburg, PA: Morehouse Publishing, 2002).

Grounded in God: Listening Hearts Discernment for Group Deliberations
Suzanne G. Farnham, Stephanie A. Hull, and R. Taylor McLean, rev. ed. (Harrisburg, PA: Morehouse Publishing, 1999).

RDG TEAM MEETINGS

The Charge given to the RDG

The RDG Team is only one of several groups and many individuals that have been, and will be, discerning on behalf of the Church and the discerner. The RDG Team will work with the discerner to help discern God's call through discussions, prayer and the guidance of the Holy Spirit. In what way is God calling this person to ministry? What potential can be seen? A final report will be prepared by the team and will contain a recommendation that the discerner either continue in the process of discerning a call to ordained ministry or continue serving God and the Church through baptismal ministry. Also, if anything about the discerner has been identified as an area of concern and would possibly benefit the discerner through additional formation, it should be indicated in the report as well.

INTRODUCTION

We uphold these values when discerning a call to ordained ministry:

- God calls people both by inward spiritual experience and by the outward beckoning of the community, the body of Christ.
- Our process of discerning various calls to ministry is rooted in the history, doctrine, community, and worship of the Episcopal Church.
- Each individual is treasured and held in the highest esteem.
- Baptism calls each person to ministry.
- All orders of ministry—laity, deacons, priests, and bishops—are equally important in carrying out the mission and ministry of Christ's Church.
- In the discernment process we are to be prayerful, centered in God, patient and yearning for gracious guidance.
- Conversations concerning discernment are always to be open and honest.
- Thorough evaluations and recommendations from sponsoring clergy and vestries/mission committees are essential and vital.

We look for these qualities in persons seeking *ordination and recognize that this is a long list and many of these qualities may still be developing:*

- *A deep commitment to follow Jesus Christ as Savior and Lord.*
- A desire to seek God's will.
- A love of Jesus Christ that can inspire and empower others.
- A practice of prayerfulness and servanthood demonstrating durable Christian faith and witness.
- A significant leadership involvement in church activities.
- Involvement in and a keen awareness of the issues of society.
- The ability to integrate the needs of the world with the message of the Gospel—a quality especially important for a deacon.
- Commitment to the development of moral character patterned after the life of Christ.
- A capacity for perseverance in difficulty, a resilience in adversity, and an ability in using life experiences as vehicles for personal growth.
- Intelligence and imagination with a sound educational background.
- The ability to learn and a desire to continue to learn.
- The ability to communicate well.
- The ability to teach and to give a reasoned account of the Gospel.
- A desire to help others grow in faith and knowledge.
- A commitment to listen with sensitivity and understanding.
- The ability to hear and accept constructive criticism.
- Initiative and energy; the capacity to be a self-starter and to work hard.
- A sense of humor and humility.
- Self-awareness, including a firm grasp of one's personal strengths and weaknesses.
- A healthy sense of personal and institutional boundaries.
- The ability to care for and serve others and to be with them in times of crisis.
- An enjoyment of others; pleasure in human interaction, and a history of getting along well with others and cooperating in team efforts.
- Breadth of vision and acceptance of others; an ability to relate to people of different personalities and ages and from varying religious, cultural, and economic backgrounds.
- A demonstrable ability to be a leader, to motivate and enable the ministry of others, and to be an agent of change.

SOME PROCEDURAL GUIDELINES

The process you are entering as a group is a delicate one and as a result, each RDG Team will probably be different. The following suggestions are meant to help in the formulation of the path to be taken when interacting with and helping your discerner in his or her discernment.

- A **Convener** or **Facilitator** should be identified to lead the meetings, help the group follow the agenda, make sure meeting times are known by all, and start and finish the meetings on time. If the convener cannot attend a meeting, it is his/her responsibility to identify a replacement.
- A **Recorder** or note taker should be identified for each meeting. Records will be important for further reflection when preparing the final report but should be destroyed after submitting your final report.
- A **Scheduler** can help in establishing the meetings dates, times, and locations most convenient to the team members and the discerner.
- A meeting should **begin with some quiet time** for centering and freeing yourselves of the worries of the world.
- Always **open each meeting with a prayer.** Several relevant prayers can be found in the BCP on pages 810-841.
- *Some form of Bible study should be used at the beginning of each meeting. This could entail some form of Bible study, such as lectio divina and should be used at the beginning of each meeting. Suggested passages are: 1 Corinthians 12: 1, 4-14: Ephesians 4: 7, 11-16: Romans 12: 1-8: and Acts 4: 1-13.*
- *All must be involved in the discussions. Although your work is primarily focused* on the discerner, members of the team should offer abbreviated comments of similar experiences in support of the discerner. Involvement by the team will reduce the feeling of an inquisition for the discerner.
- An absolute requirement is that **this entire process is <u>confidential</u>**. "What occurs in an RDG meeting stays in the RDG meeting." The only sharing occurs as the result of the distribution of the final report. The rector/vicar/priest-in-charge of the sponsoring congregation receives a copy of the final report and it is up to them whether to share the report with the Vestry. The reports sent to the Commission on Ministry and the Bishop are held in the strictest confidence.
- **All questions should be informational** and as open, honest and straightforward as possible. This means no giving advice, no "why don't you?" or "here is how I would do it." No personal agendas should be involved at all.
- **Trust in yourself** and ask questions that may be odd but meaningful to you. "What shape or color is your present vocation and what is the one you are discerning?" Why?
- **Don't be in a hurry**. Your time together should be relaxed and gentle. Leave time between questions for reflection. Don't be afraid of silence. Silence may mean something important is happening or is going to happen—don't rush to fill the silence.

- **Practice active listening** whenever possible. Listen with your entire self (senses, feelings, intuition, imagination, and all of the other rational faculties).
- **Speak only for yourself and don't interrupt**. Do not formulate what you want to say while someone else is speaking. Don't speak in broad generalizations. Don't challenge what others say.
- **Honor the positives and accept the negatives.** The discerner will succeed in his/her vocation because of what he/she does well and not because of what she/he doesn't do well. Support and encourage positive behavior of the team as well as the discerner.
- At the end of each meeting try to determine **how the team and the discerner have worked together.** One possibility is to simply ask what was good and what was not so good about how the groups worked together? Ask what helped and what hindered in the discussions and what we should continue to do, what to delete and what to add.
- Always **close the meeting with a prayer.**

SUGGESTED MEETING AGENDAS

Sessions:

1) **"Initial Organization and Training Review"** (*Dean and RDG Team*)
   - ☐ A brief period of quiet, an opening prayer and an optional Bible study or meditation.
   - ☐ Information and *training areas to review and discuss:*
     - o The overall ordination process.
     - o The role of the RDG Team in discerning a call to ordained ministry.
     - o The Deanery Discernment Committee meeting agenda.
     - o The Discernment Process (a discussion)
     - o Priest vs. Deacon – what to look for.
     - o Lay Ministry and Oblate/3rd Order – what to look for.
   - ☐ Creation of the RDG's Organization (RDG)
   - ☐ How did it go? How did we work together? What could be done better?
   - ☐ Closing prayer

2) **"Introductions and Spiritual Journey"** (*RDG Team and Discerner*)
   - ☐ A brief period of quiet, an opening prayer and an optional Bible study or meditation.
   - ☐ Emphasize that everything that happens in the meetings will be held in the strictest confidence.
   - ☐ Introduce yourselves—including the discerner—taking about at least 5 minutes each. Have the discerner share some things about the discerner's life, work, things that are important to the discerner, the discerner's relationship with the church and to God. The RDG members should also share their experiences with discernment, if any, and why this type of ministry is important to them.

     Has the discerner ever wanted to be a priest of a deacon? Has the discerner served on a discernment committee before for a rector or for someone seeking Holy Orders?
   - ☐ The remaining time should be spent listening to discerner's spiritual journey. *It is* important to work hard to set the tone of the meetings. All team members should actively participate. Listen and offer supporting comments and questions of clarification. Humor is encouraged. Remember don't offer solutions or suggestions and "no why didn't you?"
   - ☐ Remember, the meeting is open to move where it wants and, with the Holy Spirit's help, needs to. If the discerner says something that you are curious about or interested in, have the discerner explain. "Tell me more about… or that interests me tell me why you think you felt that way?"

- ☐ Remember any question is a good question as long it is as honest and sincere.
- ☐ Discuss meeting times and places, necessary absences and whatever else that seems important to team.
- ☐ How did the meeting go? How did we work together? What could be done better?
- ☐ A closing prayer.

3) "Spiritual Life and Prayer" (*RDG Team and Discerner*)

- ☐ A brief period of quiet, an opening prayer and an optional Bible study or meditation.
- ☐ Discuss the nature and regularity of the discerner's prayer life.
- ☐ Discuss whether they are currently in Spiritual Direction.
- ☐ Discuss the discerner's understanding of spirituality within the Christian context.
- ☐ Discuss the discerner's relationship with Christ.
- ☐ Discuss the place of the Eucharist in the discerner's spiritual life.
- ☐ Discuss other issues or questions regarding spiritual and prayer life.
- ☐ Discuss the place of scripture in the discerner's spiritual life.
- ☐ Close the discussion with some supportive comments about the discerner's relationship with God. What did you appreciate about what was discussed?
- ☐ How did the meeting go? Did we work together in a good way? What could be done better?
- ☐ Closing prayer.

4) "Call to Ministry - Inward and Outward Aspects" (*RDG Team and Discerner*)

- ☐ A brief period of quiet, an opening prayer and an optional Bible study or meditation.
- ☐ Have the *discerner read aloud either the Examination for the Ordination as a Deacon, BCP page 543, first two paragraphs, or for the Ordination as a Priest, BCP page 531, first three paragraphs depending on the discerned call.*
- ☐ *A* clear articulation of one's call to ordained ministry – especially to the particular order to which the discerner believes they are being called. (priest vs deacon)
- ☐ The discerners understanding of the theology of the order to which they feel called.
- ☐ The discerner's understanding of the servant nature of diaconate/priesthood.
- ☐ The discerner's understanding of the sacramental nature of the diaconate/priesthood.
- ☐ The liturgical role of a deacon/priest during the celebration of the Eucharist.

- Close the discussion with some supportive comments about the positive outward aspects of the discerner's call. *What did you appreciate about what was discussed?*
- *How did the meeting go? Did we work together in a good way? What could be done* better?
- Closing prayer.

5) "Family Life and Self Care" (*RDG Team and Discerner*)

- A brief period of quiet, an opening prayer and an optional Bible study or meditation.
- The discerner's support system in and outside of family.
- Role of a Spiritual Advisor/Director
- Financial Considerations - are they well thought out?
- Level of spouse/family support.
- Past and present self-care strategies.
- Other issues or concerns regarding family life and self-care.
- Close the discussion with some supportive comments about the positive outward aspects of the discerner's call. *What did you appreciate about what was discussed?*
- How did the meeting go? Did we work together in a good way? What could be done better?
- Closing prayer.

6) "Leadership and Ecclesiology" (Theology of the Church) (*RDG Team and Discerner*)

- A brief period of quiet, an opening prayer and an optional Bible study or meditation.
- The discerner's understanding or model of the church in the present – how the model might change in the future.
- What is your leadership style and how did you develop it? What was your first leadership role and how did it go? How has your leadership style changed, if at all, over the years?
- Issues of authority and discipline inside/outside the Church.
- How do you deal with conflict, particularly in interpersonal conflicting relationships?
- What do you do if people don't agree with you and won't follow your ideas?
- Understanding the relationship between bishop and clergy.
- Understanding of own leadership style – can give examples from past experience.

- Can describe "growing edges" regarding leadership abilities.
- Can describe strategies they might use in a hypothetical situation.
- Other issues or concerns regarding leadership and ecclesiology.

- Close the discussion with some supportive comments about the positive outward aspects of the discerner's call. What did you appreciate about what was discussed?
- How did the meeting go? Did we work together in a good way? What could be done better?

- Closing prayer.

7) "Academics and Intellectual Life" (*RDG Team and Discerner*)

- A brief period of quiet and an opening prayer and an optional Bible or meditation.
- What does the discerner understand as their ability and interest in teaching the faith.
- What kind of formal and/or disciplined course of study has the discerner engaged in related to faith?
- What is the discerner's awareness and understanding of diocesan requirements for educational preparation for ordination. (Further education)
- What other academic history has the discerner had, and what does the discerner see as their academic strengths and weaknesses.
- Interest and ability to meet academic requirements for ordained ministry.
- Other issues or concerns regarding academic and intellectual life.

- Close the discussion with some supportive comments about the positive outward aspects of the discerner's call. What did you appreciate about what was discussed?
- How did the meeting go? Did we work together in a good way? What could be done better?

- Closing Prayer.

8) "Preliminary Drafting of RDG Report" (*RDG Team*)

When all agree that there has been sufficient time and opportunity to explore all pertinent issues with the discerner, and if the discerner continues to sense a call to ordained ministry, RDG Team members need *to come to a clear consensus about their own responses to the discerner's call to ordained ministry. If a consensus cannot be reached a separate report should be issued clarifying the related issues and discussed with the Bishop. A report*

prepared by the assigned RDG reporter and signed by all RDG Team members will either:

1. *Or: Recommend that the discerner continue the process toward ordination. After meeting with the discerner in an in-depth exploration of all aspects of their call, it is the consensus of the RDG Team that the discerner has a clear understanding of the process and* requirements for ordination in our diocese, has thoroughly tested the call and that they too sense that the discerner may have a call to ordained ministry.
2. Or: Agree that they too, sense of call to ordained ministry, but recommend further time, prayer and discernment for the discerner to clarify what that call might be.
3. Or:Not recommend the discerner, at this time, to continue an exploration of a call to ordained ministry.
4. Or: The discerner needs to hear what gifts for ministry the RDG did has seen in them and encourage them the discern and explore lay ministry more deeply.

Preparations (suggested)

- Find a comfortable and quiet place where you won't be interrupted and spend some time with God. Ask God to guide your recollections and reflections.
- Read all of the notes for each session and spend some time in reflection on each and how each relates to the whole.

Review previous sessions

- What have been the discerner's attitude, involvement and response to the process?
- Has the discerner been open and willing to share her ideas and thoughts?
- Have you seen any signs of spiritual growth during the sessions?
- What areas have been identified as needing some work?
- What has been each of the team member's response so far to the discerner's discerned call to ordain ministry?
- Have you identified any evidence that may suggest that ordination may be a way to find identity rather than to express ministry, more for the "self" than for the Church?
- Finish the discussion with a closing prayer and a request for the Holy Spirit to continue to be with the team and the discerner.
- Some questions to consider:
    - Does the discerner have a good understanding of the nature and demands of the ministry to which he or she believes they are called?
    - Does the discerner have the personality and skills appropriate for the order to which he or she feels called?
    - What are the discerner's strengths for this ministry?
    - Do you see any problem that might make ordination inappropriate for the discerner?

- Can you see the discerner as <u>your</u> deacon or priest?
- To which order does the discerner feel called? To which order do you believe the discerner is called? Why?

☐ When you are ready, review the suggested RDG Report Outline below. Take your time with each question. Pay attention to your comments realizing they may affect both the discerner and the Church in some way. After you have written your response to the questions, reflect on the discerner and the members on the team. Give thanks for all the gifts they have given you over the past three months or so.

☐ Send your responses to the member of the team that has agreed to draft the final report.

Prepare the RDG Report

☐ Identify a member of the team willing to compile the team members responses into a first draft of the RDG Report following the suggested format.

☐ **The final report must recommend** the discerner continue the process of discernment toward ordained ministry as a deacon or a priest or pursue a particular ministry in lay leadership e.g. lay preaching, evangelist, catechist. No other recommendation can be made.

☐ Circulate the draft to the team, collect all suggested changes and prepare the final report. If consensus on the recommendation to the Commission on Ministry was not possible, a dissenting report may be prepared and submitted by the descanter.

9) "Review of the Final Report" (RDG Team and Discerner)

☐ Open with a prayer.

☐ The RDG Team shares their final report both orally and in writing with the discerner, supporting it with examples.

☐ Particular attention should be paid to the recommendation and if it differs from a recommendation to continue with the process of Holy Orders, significant justification for the recommendation must be supplied.

Suggested Outline of the RDG Report to the Rector/Vicar/Priest-in-Charge and the Vestry/Mission Committee and should include:

1. Date
2. Name of discerner
3. Names of RDG members
4. Congregations of the RDG members
5. Responses to the following:

    a. The RDG's understanding of the discerner's call to ordained ministry.

    b. The RDG's understanding of the discerner's spiritual strengths and weaknesses.

    c. An assessment of the discerner's intellectual ability to pursue graduate level studies in theology, scripture, etc.

    d. A description of the discerner's family situation, including how spouse, partner, children, siblings and parents feel about the discerner's desire for ordination.

    e. A description of the discerner's spiritual history

    f. A description of the discerner's life and ministry in the congregation

    g. An assessment of the discerner's potential for leadership in the church.

    h. An assessment of the discerner's effectiveness in pastoral and/or interpersonal relationships in the congregation.

    i. Additional observations that the Rector/Vicar and Vestry/Mission Committee should know about.

    j. The RDG's formal recommendation for the discerner at this point in time.

    k. Signatures of all members.

- The RDG report will be sent to the Bishop along with the Vestry/Mission Committee endorsement, should that body decide to endorse the discerner.

APPENDIX A

Best Practices for a Discernment Process[1]

- Prayerful listening.
- Open mind and open heart.
- Confidentiality.
- Consider this work a high priority and a gift of your time and talents to the Church.
- Trust in the Holy Spirit to guide the process.
- Open in prayer and close in prayer.
- Be respectful and accepting of one another's views and thoughts.
- Be compassionate and caring of all involved in this process.
- Be willing to be influenced by others, not locked into your own opinion
- Listen and guide rather than give advice.
- Raise caring and probing questions to help the discerner move toward a sense of clearness and a deeper comprehension of an issue in relation to God's call.
- This process is focused on the individual's discernment and assisting him/her through this process. Questions that satisfy your curiosity are focused on you, not on the individual, and are not appropriate.

[1] Developed by Lisa Sargent and Mary Davy.

APPENDIX B

Regional Discernment Group Authorized Trainers

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APPENDIX D:
TRANSITIONAL DEACON EXPERIENCE

EPISCOPAL DIOCESE OF NORTHERN CALIFORNIA

THE TRANSITIONAL DEACON EXPERIENCE

Purpose of This Program

Since about the 6th Century AD, ordination to the diaconate has been required as a prerequisite for being ordained to the priesthood. As a result, the role of Deacon as a permanent calling basically disappeared for several centuries, and has only recently been again recognized as a primary call. This diaconal requirement for priests has been dealt with in a number of ways, including basically ignoring the diaconal vocation and merely serving as a "junior priest" until priestly ordination. There have been attempts to change this requirement for priests over the years but, at this time, diaconal ordination is still a required step.

The Transitional Deacon Experience is designed to introduce you following your ordination to the life and basic vocation of a deacon in the Episcopal Church through reading, discussion and experience. Here in the Diocese of Northern California we believe that the vows of a deacon are to be taken seriously and that gaining some actual experience as a deacon can enhance your future ministry as a priest. In fact, many priests who have lived out the role of deacon during their Transitional Diaconate have said that the experience was very helpful and enriching to their priestly ministry. In addition, we hope that experiencing the role of a deacon, even briefly, will enable you to engage with deacons you might work with in the future in a collegial and effective manner as equal members of the clergy team.

Learning Objectives

The goal is not for you to become an accomplished deacon in the next few months, but rather to give you an understanding and some experience of the basics of ministry as a deacon. To that end, we hope to help you achieve the following Learning Objectives:

1. Achieve a basic understanding of the history of the diaconate.

2. Articulate clearly an understanding of the role of deacon in relationship to the bishop, priest and laity.

3. Explain and demonstrate the role and duties of the Deacon in liturgy, including the symbolism involved.

4. Clarify the role of the Deacon, and of the Church as a whole, in serving the less fortunate, marginalized and oppressed.

5. Identify ways to discover the issues, needs, concerns and responses of the marginalized and oppressed in the community you serve.

6. Practice ways of identifying and communicating the needs, hopes and concerns of the world to the Church.

7. Develop at least one skill for assisting lay members of the Church live into their baptismal covenant.

The Program Process

The retreat prior to your ordination is designed to give you some of the information necessary to successfully enter into the world of the deacon. There will be time built in for personal reflection and meditation as well as group sharing. Your time as a Transitional Deacon will be whatever you make of it but this program aims to highlight some specifics designed to help you stay focused and learn what the life of a deacon is like.

Upon ordination to the office of Deacon, you will be assigned to a parish and serve as deacon for the duration of your Transitional Diaconate. You and a priest from that parish (usually the Rector/Priest-in-Charge/Vicar) will meet and complete a Transitional Deacon Learning Agreement outlining the terms of your placement. You will also be assigned a mentor deacon, who is not a supervisor, but a person you can go to for guidance, knowledge and support. Your overall program will be overseen and guided by the Archdeacons, who are also available to you for counsel and support.

There will be a monthly gathering of the Transitional Deacons that will be arranged so that all can attend. Most often these meetings will be conducted electronically using Zoom technology. Most sessions will be one hour in length. You will have assignments to enhance your learning in specific areas of diaconal ministry and we will together discuss your experience with those assignments during the gathering.

You should submit a paper to the Archdeacons via email in the week prior to the meeting describing the diaconal experiences that month and your reaction to those experiences. (1-3 pages, double-spaced)

Reflect frequently about how these experiences relate to the vows you took when ordained as a deacon. You might want to share these insights with your mentor deacon and your COM Liaison as well as with the Archdeacons and the other Transitional Deacons. You will also need to develop a portfolio as you go along. This portfolio will be presented to the Commission on Ministry at the end of your Transitional Deacon experience and will include your monthly experience papers. We will discuss the Portfolio in more detail at the retreat. This is <u>your</u> experience and we want you to benefit from it in a way that best works for you within the parameters of the program goals. The Commission on Ministry will be

interested in what you have experienced, what you have learned, and what changes may have occurred for you during the program.

Books used in monthly assignments:

Readings from: Plater, Ormonde. *Many Servants: An Introduction to Deacons. (Revised Edition).* Lanham, MD: Rowman and Littlefield, 2004

Watson Epting, Susanne. *Unexpected Consequences: The Diaconate Renewed.* NY: Morehouse Publishing, 2015.

Session 1 Program Overview/What is a Deacon?/Bishop-Priest-Deacon Roles and Relationships

Check-in
Homework prior to session:

- ✓ Complete Transitional Deacon Learning Agreement with Supervisor and send to Archdeacons, COM liaison, and chair of the COM

Readings:

- ✓ Ordination of a Deacon, BCP, pp. 537-547
- ✓ Handout – Vows and Charges: Deacon/Priest
- ✓ *Many Servants:* Preface, Introduction, and Chapters 1 and 7
- ✓ *Unexpected Consequences:* Preface and pp. 1-33

Session 2 The Deacon in Liturgy

Check-in
Homework prior to session:

- ✓ Identify BCP Rubrics related to the deacon's role in liturgy. *These are easy to find by going to the Online Book of Common Prayer http://www.bcponline.org and searching for "deacon".*
- ✓ Practice setting the table, serving at the Eucharist, and clearing the table in your parish.
- ✓ Practice proclaiming the Gospel, bidding the Confession (and the Creed if the Bishop isn't present), and Dismissal.

Readings:

- ✓ *Many Servants:* Chapter 9
- ✓ *Unexpected Consequences:* Chapters 4 and 5.

Session 3 Serving the Poor, Weak, Sick and Lonely

Check-in
Homework prior to session:

- ✓ Identify the ways in which your parish serves the poor, weak, sick and lonely. What's missing?

Readings:

- ✓ Handout – Demographic tools
- ✓ *Many Servants:* Chapter 8 (find a Deacon and story that inspires you)
- ✓ *Unexpected Consequences:* Chapter 6

Session 4 Interpreting the Needs, Hopes and Concerns of the World

Check-in
Homework prior to session:

- ✓ Identify at least one way in which your parish addresses the needs, hopes, concerns of the world.

Readings:

- ✓ *Unexpected Consequences:* Chapter 9; Postscript (pp.155-172)
- ✓ Handout: The Diaconal Hermeneutic and Diaconal Preaching

Session 5 Ministry of the Baptized and the Deacon

Check-in
Homework prior to session:

- ✓ Identify the ways in which the laity are encouraged to minister in your parish.

Readings:

- ✓ Baptismal Covenant, BCP 304-305
- ✓ *Many Servants:* Chapter 9
- ✓ *Unexpected Consequences:* Chapter 3 and 8

Session 6 Review of Core Concepts
Check-In
Revisit:

a. What is a deacon?
b. Deacon in Liturgy
c. Serving the Poor, Weak, Sick and Lonely

d. Interpreting the Needs, Hopes and Concerns of the World to the Church
e. Ministry of the Baptized and the Deacon

PORTFOLIO: As you progress towards program completion you will be developing a portfolio that will document your Transitional Deacon learning experience. This portfolio is documentation of your personal journey as a Deacon and is a requirement of the COM. It should be in electronic form with a copy sent to the Ordinations Process Coordinator (ordinations@norcalepiscopal.org) and to your COM liaison at least two weeks before your ordination interview. The purpose of this portfolio is to collect ideas, inspirations and resources. Many of the items you include in this portfolio will be useful if you are putting together an OTM ministry portfolio.

The portfolio may include but is not limited to:

- Your monthly meditations on the diaconate shared with your deacon mentor and the Archdeacons
- Your contributions to the church newsletter
- Sermons (print, audio, video-at least one video, if possible)
- Information related to classes you have taught or presentations you have made (Curriculum outlines, lecture notes, etc.)
- News articles about concerns in the world and the local community
- Stories of diaconal work in the church and beyond that inspire you
- Plans for missional activity
- Lists of neighborhood resources
- Lists of topical books you have read or would like to read

Additional Books about Deacons (Optional Reading)

The Diaconate: A Full and Equal Order, by James M. Barnett
Deacons and the Church, by John N. Collins
Deacons in the Liturgy, by Ormonde Plater
Being a Deacon Today, by Rosalind Brown
All who Minister, by Maylanne Maybee
The Servant Church, by John Booty
Servanthood, by Bennett J. Sims